

Create Requisitions Overview

A requisition is a request for the procurement of goods and/or services and is required for all inventory items. For specific details related to inventory requisitions, please refer to the course entitled **501 PR347: Inventory Issuances and Restock**, located on the Cardinal website in **Course Materials** under **Training**.

For non-inventory items and services, a requisition is used to assign buyers and track the progress and status of a purchase request. Requisitions can be created from existing contracts, copied from other requisitions, or created ad hoc. All requisitions must be approved by a supervisor before they can be executed via a purchase order (PO) or contract.

Please refer to the course entitled **501 PR342: Processing Requisitions**, located on the Cardinal website in **Course Materials** under **Training**, for more information on creating and maintaining regular requisitions using the Procurement and eProcurement modules.

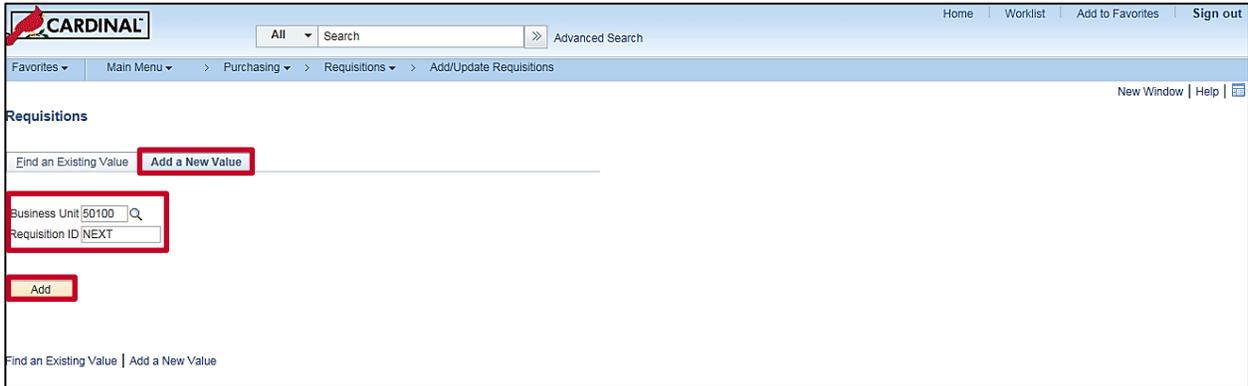
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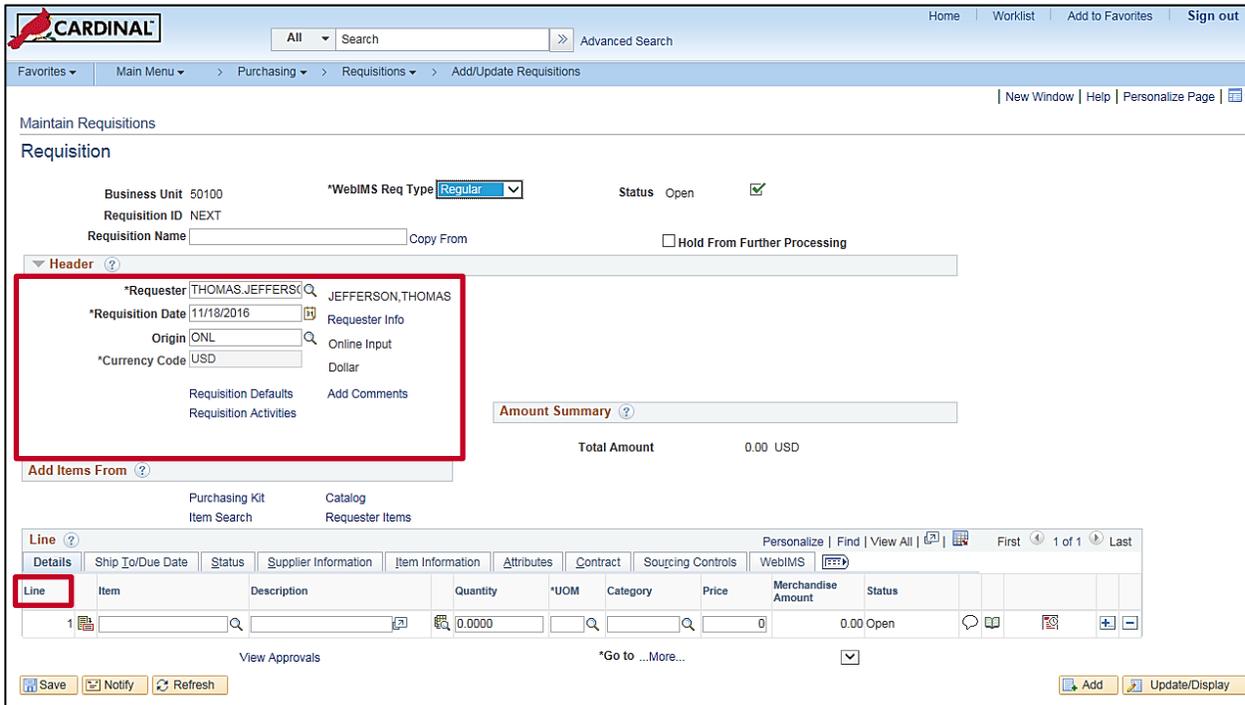
Create a New Requisition (Beginning Steps for All Requisitions)

1. Navigate to the **Requisitions** page using the following path:

Main Menu > Purchasing > Requisitions > Add/Update Requisitions



2. Select the **Add a New Value** tab:
 - a. **Business Unit: 50100**
 - b. **Requisition ID: NEXT** and should not be changed. Cardinal assigns a **Requisition ID** number when you successfully save the requisition.
3. Click the **Add** button. The **Maintain Requisitions – Requisitions** page displays.



Business Unit 50100 *WebIMS Req Type **Regular** Status Open

Requisition ID NEXT

Requisition Name Copy From Hold From Further Processing

Header

*Requester THOMAS.JEFFERS JEFFERSON, THOMAS

*Requisition Date 11/18/2016 Requirer Info

Origin ONL Online Input

*Currency Code USD Dollar

Requisition Defaults Add Comments

Requisition Activities

Amount Summary

Total Amount 0.00 USD

Add Items From

Purchasing Kit Catalog

Item Search Requirer Items

Line

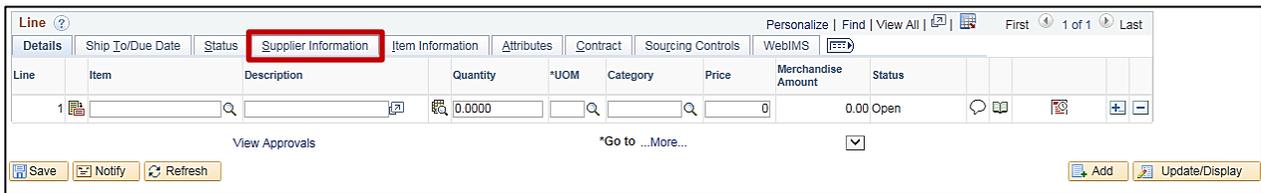
Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1			0.0000			0	0.00	Open

View Approvals *Go to ...More...

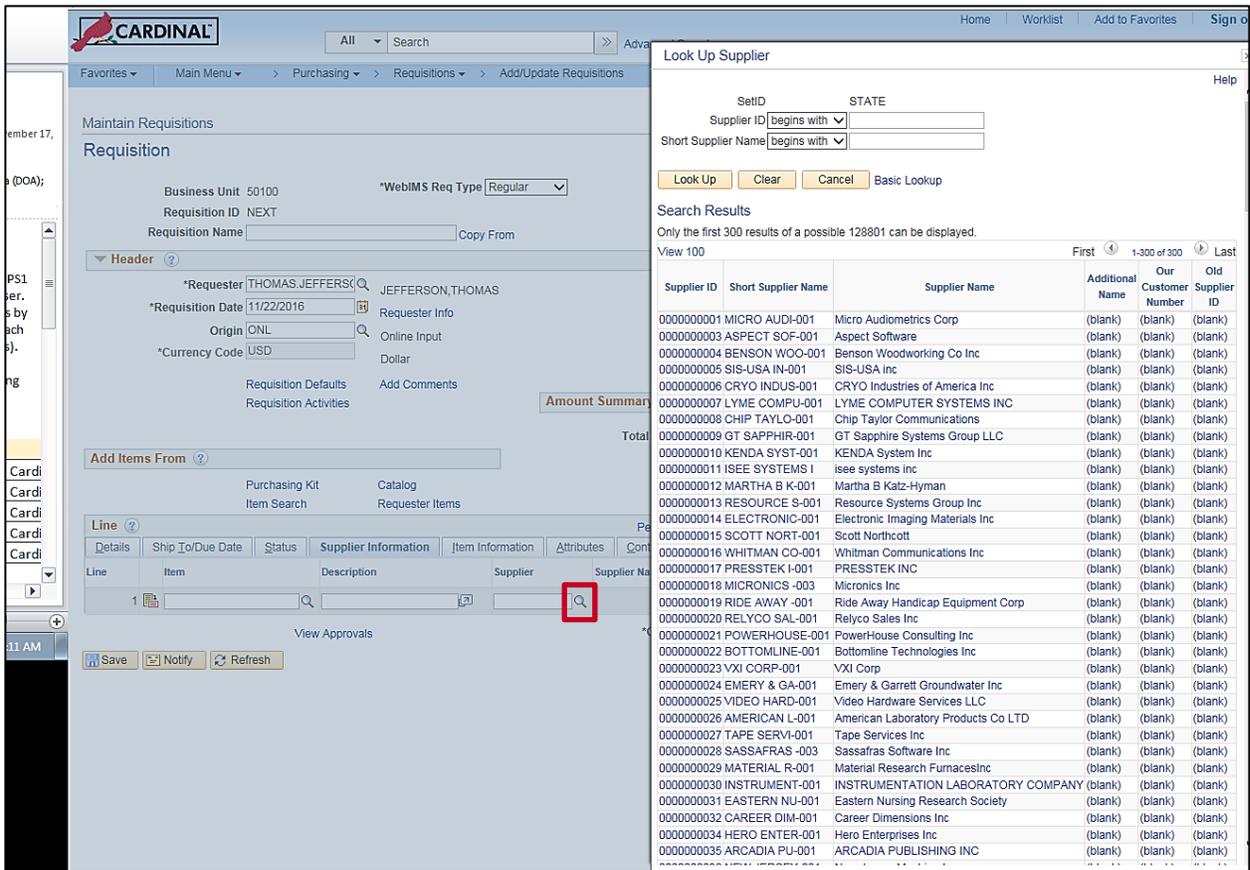
Save Notify Refresh Add Update/Display

4. The **Header** section contains some key data to include **Requester**, **Requisition Date**, and **Origin**.
5. Default information, such as **Requester** and **Ship To** values, automatically populate based on your user setup, but can be changed as necessary. The **Ship To/Due Date** tab allows you to select desired date and modify the **Ship To** location.
6. For more detailed instructions, please refer to the course entitled **501 PR342: Processing Requisitions**, located on the Cardinal website in **Course Materials** under **Training**.

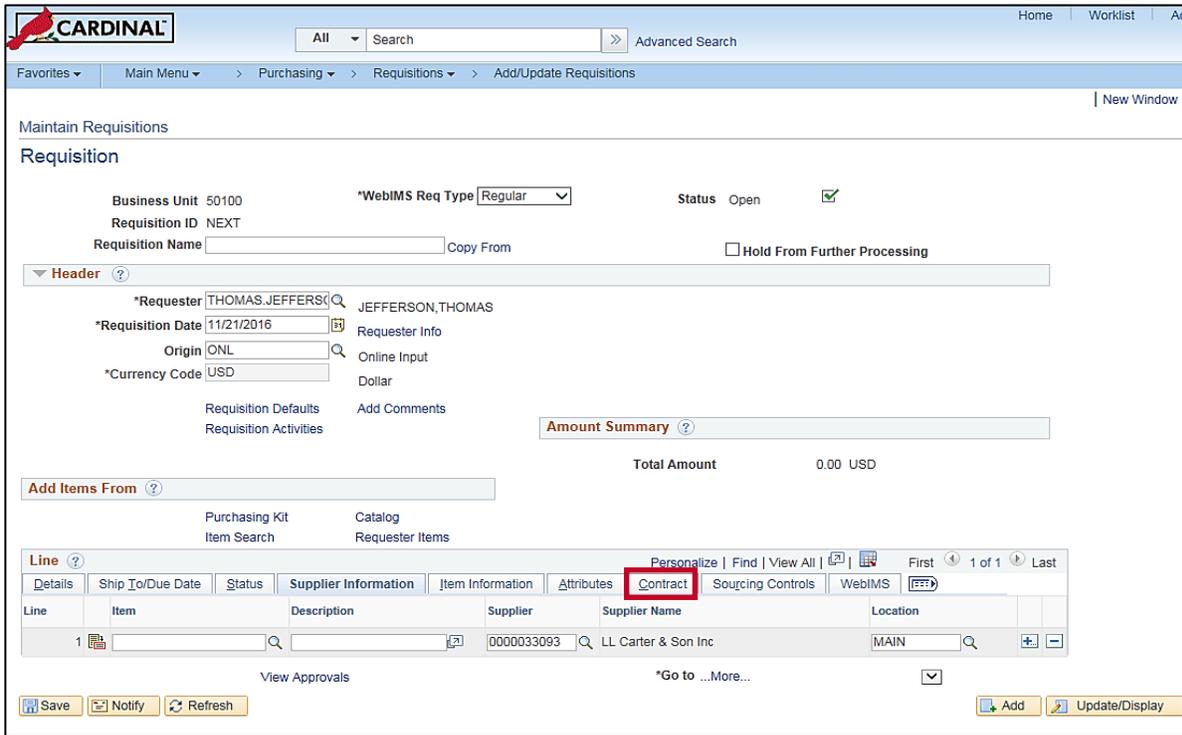
Create a Requisition (1 Item/Line) from a Contract



1. Click the **Supplier Information** tab.



2. Search for the supplier related to the contract. The **Supplier Information** tab displays suppliers related to the selected Item. You can search for and select any supplier that you wish to display by clicking the **Supplier** field lookup icon.
3. Click the selected **Supplier** link. The selected supplier's information will populate.



CARDINAL Home Worklist Ad
 All Search Advanced Search
 Favorites Main Menu Purchasing Requisitions Add/Update Requisitions | New Window |

Maintain Requisitions

Requisition

Business Unit 50100 *WebIMS Req Type Regular Status Open

Requisition ID NEXT
 Requisition Name Copy From Hold From Further Processing

▼ Header ?

*Requester THOMAS.JEFFERS(JEFFERSON,THOMAS
 *Requisition Date 11/21/2016 Requirer Info
 Origin ONL Online Input
 *Currency Code USD Dollar

Requisition Defaults Add Comments
 Requisition Activities

Amount Summary ?
 Total Amount 0.00 USD

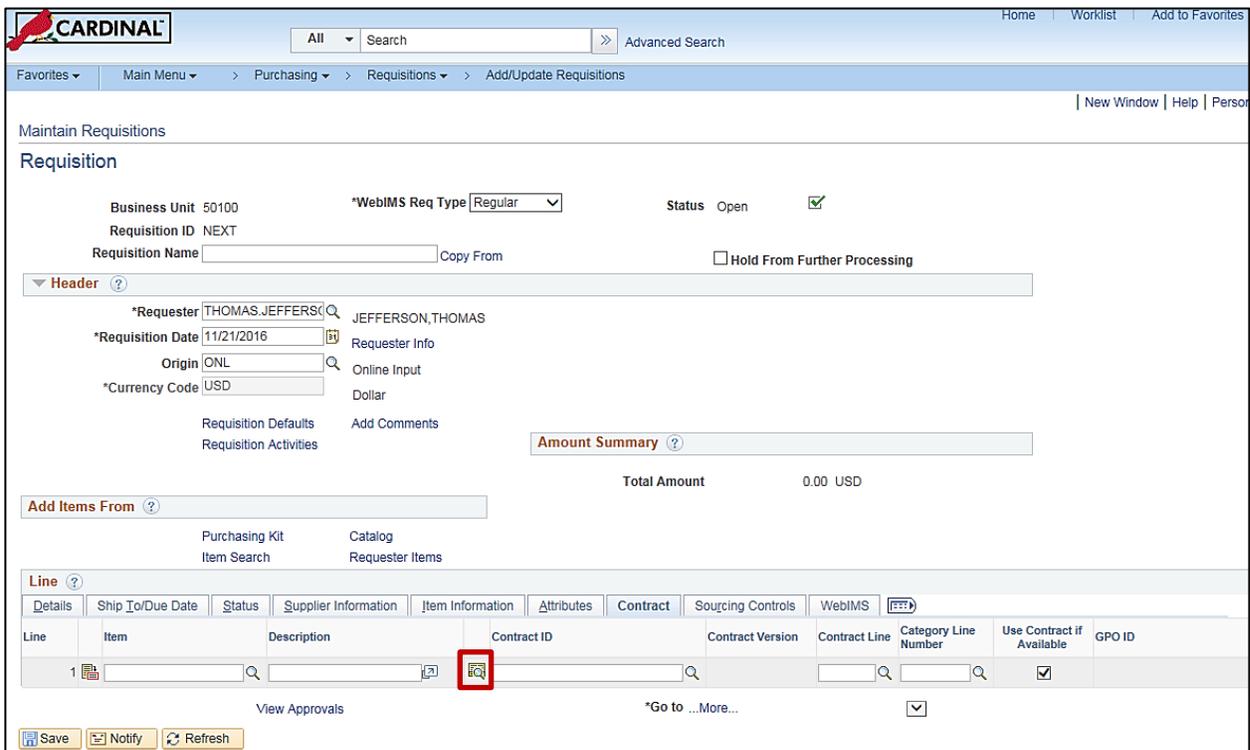
Add Items From ?
 Purchasing Kit Catalog
 Item Search Requirer Items

Line ? Personalize | Find | View All | 1 of 1 | Last
 Details Ship To/Due Date Status Supplier Information Item Information Attributes **Contract** Sourcing Controls WebIMS

Line	Item	Description	Supplier	Supplier Name	Location
1			0000033093	LL Carter & Son Inc	MAIN

View Approvals *Go to ...More...
 Save Notify Refresh Add Update/Display

4. Click the **Contract** tab.



CARDINAL Home Worklist Add to Favorites
 All Search Advanced Search
 Favorites Main Menu Purchasing Requisitions Add/Update Requisitions | New Window | Help | Person

Maintain Requisitions

Requisition

Business Unit 50100 *WebIMS Req Type Regular Status Open

Requisition ID NEXT
 Requisition Name Copy From Hold From Further Processing

▼ Header ?

*Requester THOMAS.JEFFERS(JEFFERSON,THOMAS
 *Requisition Date 11/21/2016 Requirer Info
 Origin ONL Online Input
 *Currency Code USD Dollar

Requisition Defaults Add Comments
 Requisition Activities

Amount Summary ?
 Total Amount 0.00 USD

Add Items From ?
 Purchasing Kit Catalog
 Item Search Requirer Items

Line ? Personalize | Find | View All | 1 of 1 | Last
 Details Ship To/Due Date Status Supplier Information Item Information Attributes **Contract** Sourcing Controls WebIMS

Line	Item	Description	Contract ID	Contract Version	Contract Line	Category Line Number	Use Contract if Available	GPO ID
1							<input checked="" type="checkbox"/>	

View Approvals *Go to ...More...
 Save Notify Refresh Add Update/Display

5. Click the **Contract Search** icon.

- Click the **Contract Reference** tab to see the lines for each contract.

Contract Search
Help

Search Criteria

SetID STATE

Contract ID

Contract Style

Contract Process Option

Description

Master Contract ID

Contract Reference Type

Requisition Date 11/21/2016

Supplier SetID STATE

Supplier ID LL Carter & Son Inc

Item SetID STATE

Item ID

Item Description

Category

Corporate Contract

Contract Details Personalize | Find | View 100 | First 1-10 of 103 Last

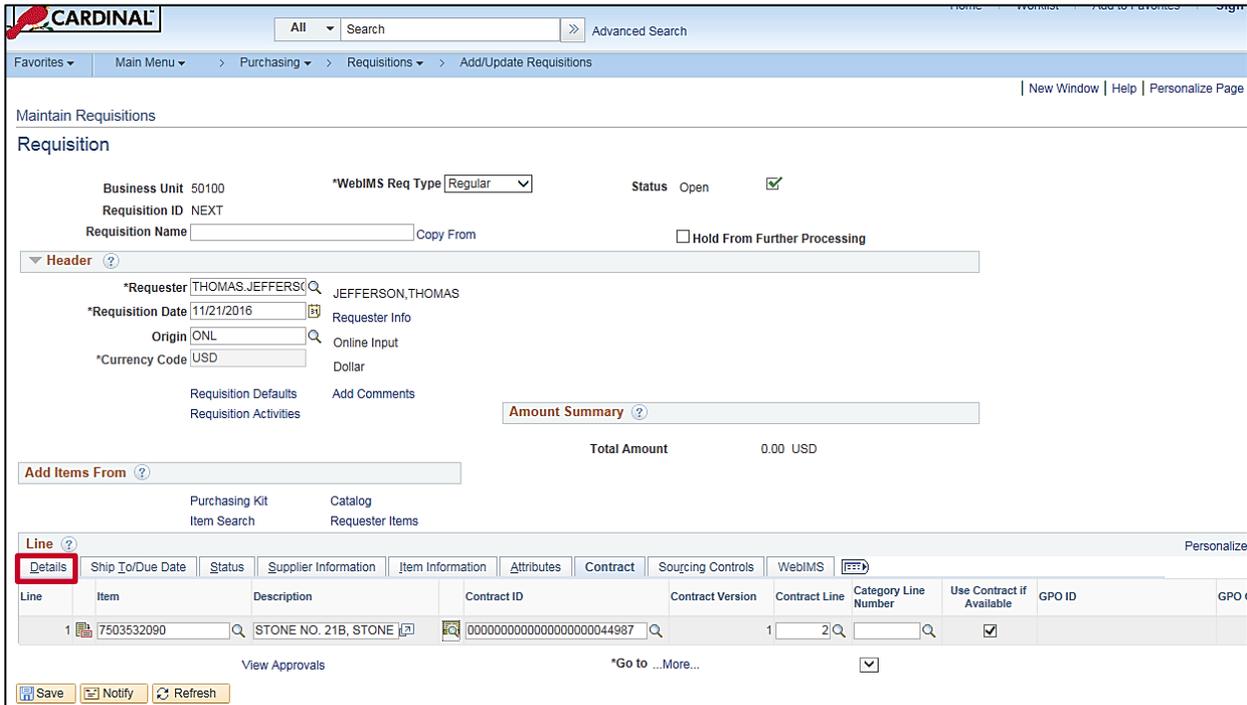
Item Detail

Contract Reference

Contract Detail

Select	Contract ID	Contract Version	Category Line Number	Item Line Number	Remaining Quantity	Unit of Measure	Contract Reference Type	Remaining Line Amount	Currency
<input type="checkbox"/>	00000000000000000000000044987	1		1		N/A LTN	Line Item	N/A USD	
<input checked="" type="checkbox"/>	00000000000000000000000044987	1		2		N/A LTN	Line Item	N/A USD	
<input type="checkbox"/>	00000000000000000000000044987	1		3		N/A LTN	Line Item	N/A USD	
<input type="checkbox"/>	00000000000000000000000044987	1		4		N/A LTN	Line Item	N/A USD	
<input type="checkbox"/>	00000000000000000000000044987	1		5		N/A LTN	Line Item	N/A USD	
<input type="checkbox"/>	00000000000000000000000044987	1		6		N/A LTN	Line Item	N/A USD	
<input type="checkbox"/>	00000000000000000000000044987	1		7		N/A LTN	Line Item	N/A USD	
<input type="checkbox"/>	00000000000000000000000044987	1		8		N/A LTN	Line Item	N/A USD	
<input type="checkbox"/>	00000000000000000000000044987	1		9		N/A LTN	Line Item	N/A USD	
<input type="checkbox"/>	00000000000000000000000044987	1		10		N/A LTN	Line Item	N/A USD	

- To use a line on the requisition, click the check-box to the left of the selected line. Only one line may be selected for copying.
- Click the **OK** button.



Business Unit 50100 *WebIMS Req Type Regular Status Open

Requisition ID NEXT

Requisition Name Copy From Hold From Further Processing

*Requester THOMAS.JEFFERS JEFFERSON,THOMAS

*Requisition Date 11/21/2016 Requisition Info

Origin ONL Online Input

*Currency Code USD Dollar

Requisition Defaults Add Comments

Requisition Activities

Amount Summary

Total Amount 0.00 USD

Add Items From

Purchasing Kit Catalog

Item Search Requirer Items

Line

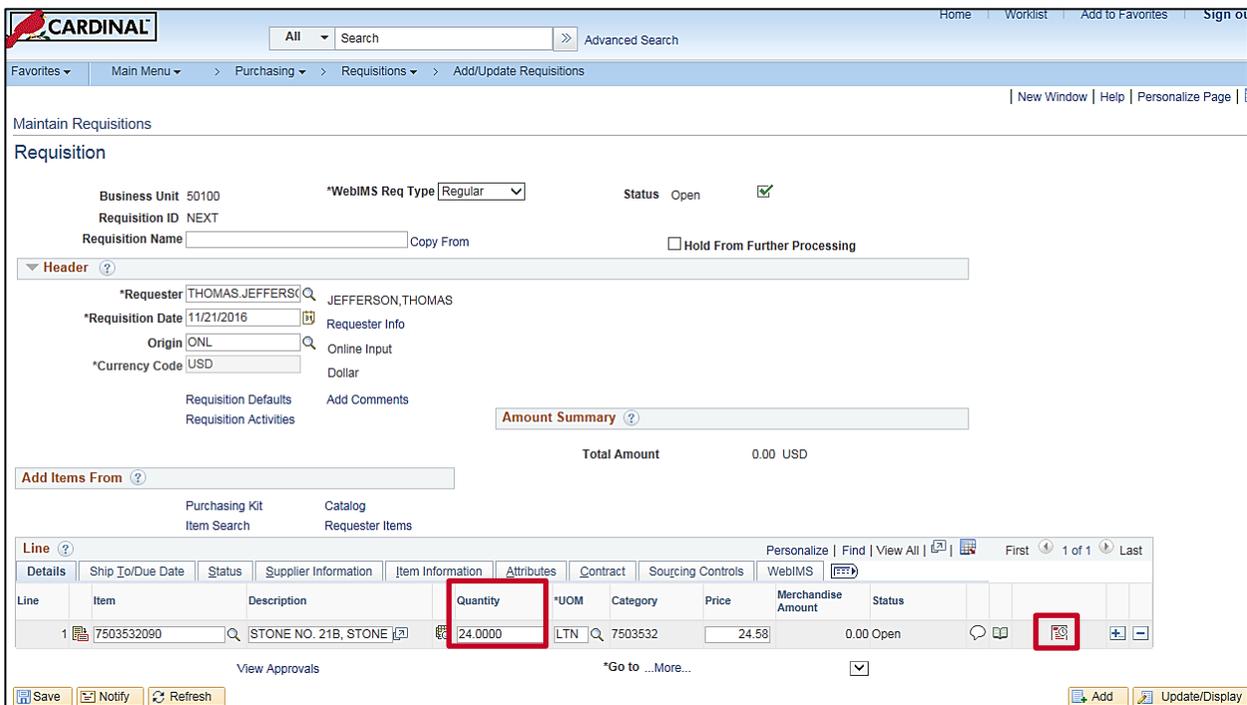
Details Ship To/Due Date Status Supplier Information Item Information Attributes Contract Sourcing Controls WebIMS

Line	Item	Description	Contract ID	Contract Version	Contract Line	Category Line Number	Use Contract if Available	GPO ID	GPO C
1	7503532090	STONE NO. 21B, STONE	00000000000000000000000044987		1	2	<input checked="" type="checkbox"/>		

View Approvals *Go to ...More...

Save Notify Refresh

- The **Item** details from the selected contract line populate the new requisition line.
- Click the **Details** tab.



Business Unit 50100 *WebIMS Req Type Regular Status Open

Requisition ID NEXT

Requisition Name Copy From Hold From Further Processing

*Requester THOMAS.JEFFERS JEFFERSON,THOMAS

*Requisition Date 11/21/2016 Requisition Info

Origin ONL Online Input

*Currency Code USD Dollar

Requisition Defaults Add Comments

Requisition Activities

Amount Summary

Total Amount 0.00 USD

Add Items From

Purchasing Kit Catalog

Item Search Requirer Items

Line

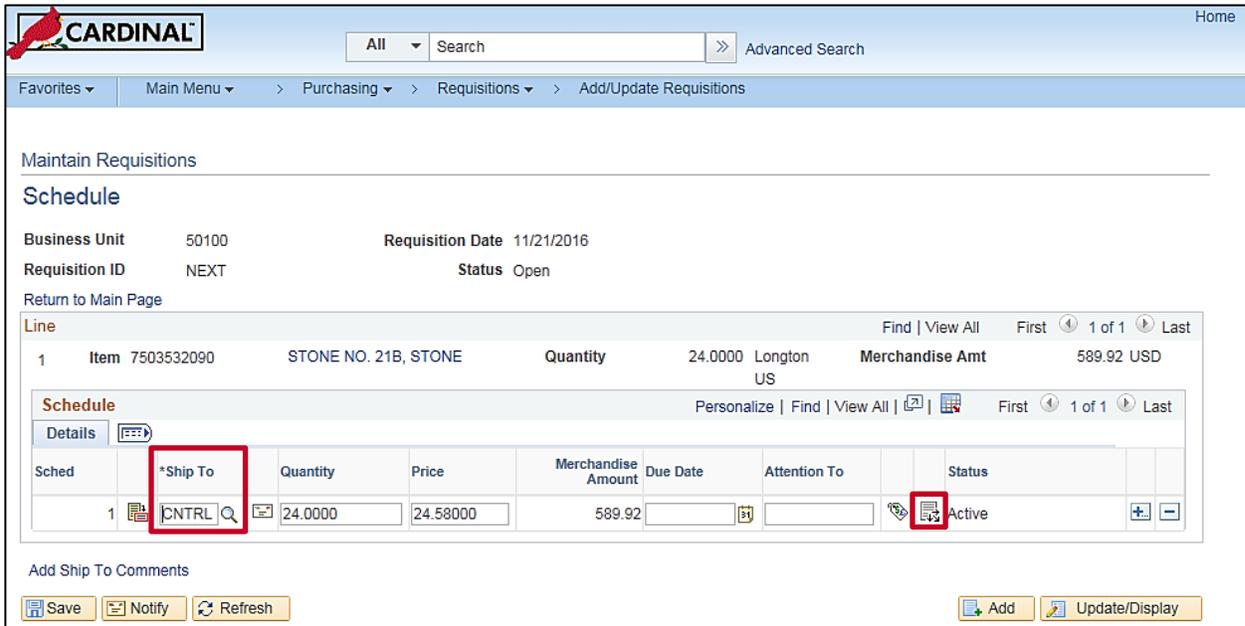
Details Ship To/Due Date Status Supplier Information Item Information Attributes Contract Sourcing Controls WebIMS

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1	7503532090	STONE NO. 21B, STONE	24.0000	LTN	7503532	24.58	0.00	Open

View Approvals *Go to ...More...

Save Notify Refresh Add Update/Display

- Enter the **Quantity** requested.
- Click the **Schedule** icon.



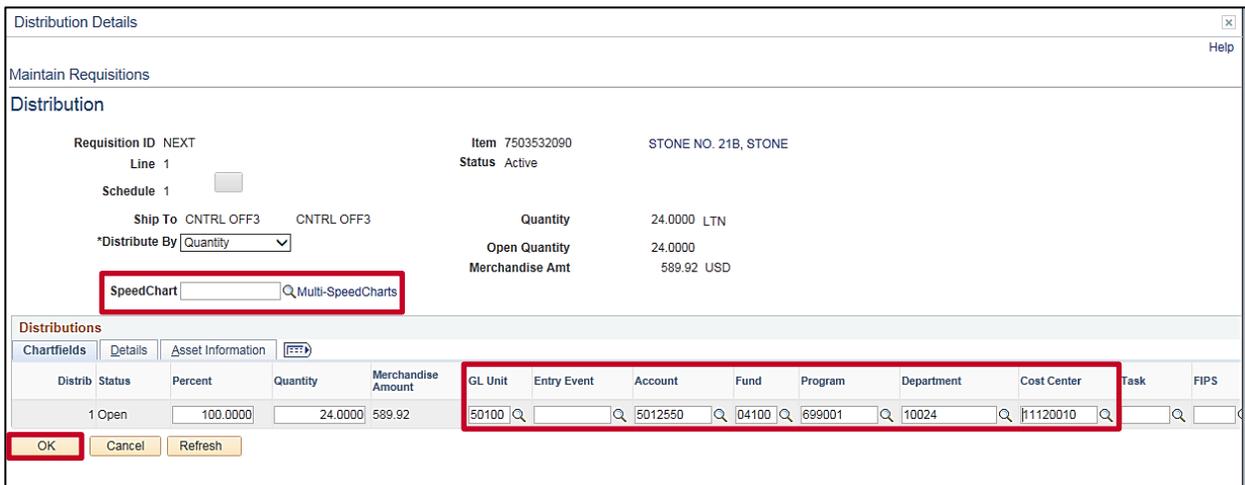
Business Unit 50100 **Requisition Date** 11/21/2016
Requisition ID NEXT **Status** Open
[Return to Main Page](#)

Line	Item	Description	Quantity	Longton	Merchandise Amt	US
1	7503532090	STONE NO. 21B, STONE	24.0000	Longton	589.92	USD

Sched	*Ship To	Quantity	Price	Merchandise Amount	Due Date	Attention To	Status
1	CNTRL	24.0000	24.58000	589.92			Active

[Save](#) [Notify](#) [Refresh](#) [Add](#) [Update/Display](#)

16. **Ship To** location is populated based on the user defaults and can be edited if needed.
17. Click the **Distribution** icon.

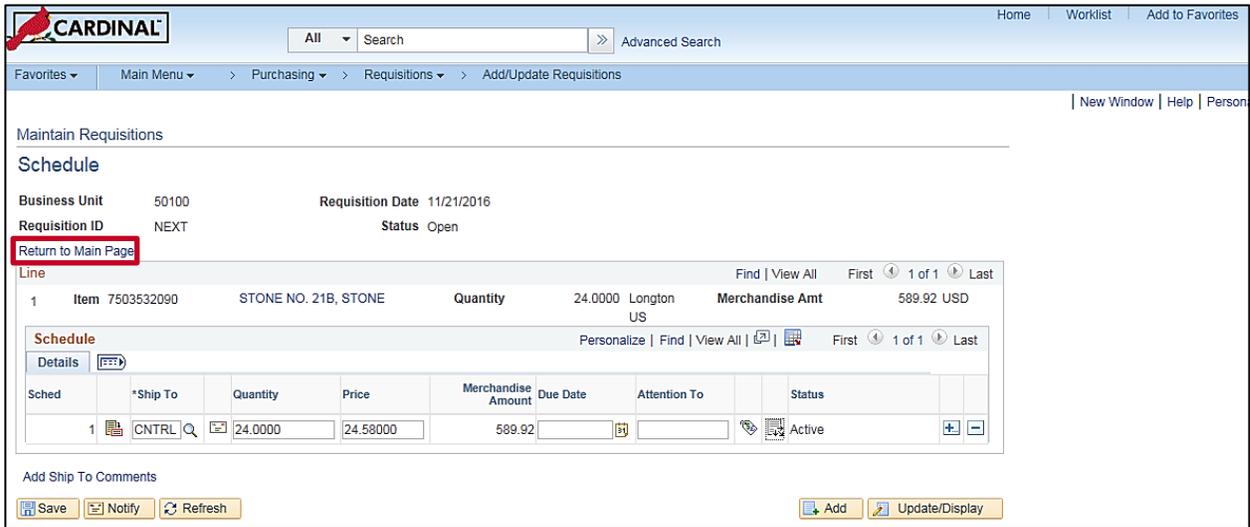


Requisition ID NEXT **Item** 7503532090 **STONE NO. 21B, STONE**
Line 1 **Status** Active
Schedule 1
Ship To CNTRL OFF3 **Quantity** 24.0000 LTN
***Distribute By** Quantity **Open Quantity** 24.0000
Merchandise Amt 589.92 USD
SpeedChart [Multi-SpeedCharts](#)

Distrib	Status	Percent	Quantity	Merchandise Amount	GL Unit	Entry Event	Account	Fund	Program	Department	Cost Center	Task	FIPS
1	Open	100.0000	24.0000	589.92	50100		5012550	04100	699001	10024	11120010		

[OK](#) [Cancel](#) [Refresh](#)

18. Enter valid chart of accounts values. A **Schedule** may have one or more **ChartField** distributions. The **ChartField** values identify the accounting distribution. The insertion of valid **Account**, **Department**, **Cost Center**, or **Project** values are required. You can manually enter a ChartField value, or you can use the **Multi-SpeedCharts** link to select a **SpeedChart** value to automatically populate some of the ChartField values for you.
19. You may insert or delete additional accounting distributions by scrolling right and clicking the (+)/(-) icons at the end of the accounting distribution line.
20. Click the **OK** button. You will return to the **Maintain Requisitions – Schedule** page.



CARDINAL | Home | Worklist | Add to Favorites
 All Search >> Advanced Search
 Favorites > Main Menu > Purchasing > Requisitions > Add/Update Requisitions | New Window | Help | Person

Maintain Requisitions

Schedule

Business Unit 50100 Requisition Date 11/21/2016
 Requisition ID NEXT Status Open

Return to Main Page

Line	Item	Description	Quantity	Unit	Merchandise Amt
1	7503532090	STONE NO. 21B, STONE	24.0000	Longton US	589.92 USD

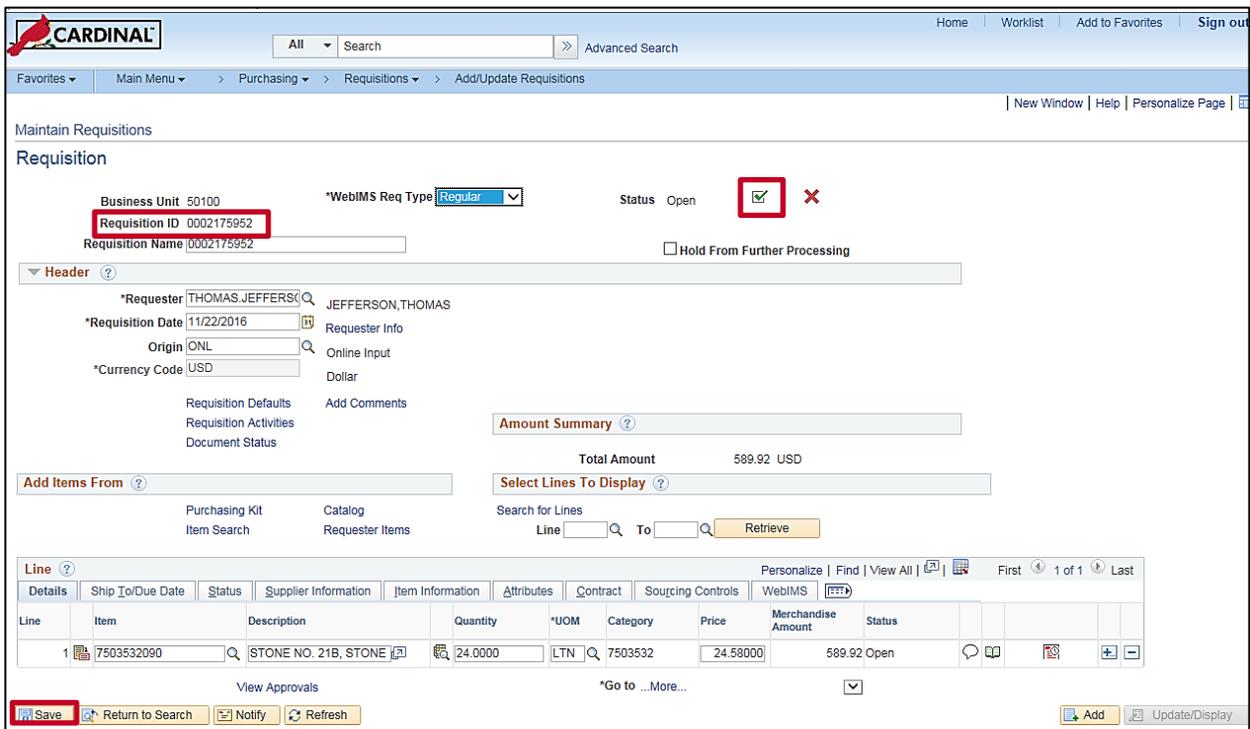
Schedule Personalize | Find | View All | First 1 of 1 Last
 Details (FF)

Sched	*Ship To	Quantity	Price	Merchandise Amount	Due Date	Attention To	Status
1	CNTRL	24.0000	24.58000	589.92			Active

Add Ship To Comments

Save Notify Refresh Add Update/Display

21. Click the **Return to Main Page** link. The **Maintain Requisitions – Requisition** page displays.



CARDINAL | Home | Worklist | Add to Favorites | Sign out
 All Search >> Advanced Search
 Favorites > Main Menu > Purchasing > Requisitions > Add/Update Requisitions | New Window | Help | Personalize Page

Maintain Requisitions

Requisition

Business Unit 50100 *WebIMS Req Type Regular Status Open X
 Requisition ID 0002175952
 Requisition Name 0002175952 Hold From Further Processing

Header

*Requester THOMAS.JEFFERS JEFFERSON, THOMAS
 *Requisition Date 11/22/2016 Requirer Info
 Origin ONL Online Input
 *Currency Code USD Dollar

Requisition Defaults Add Comments
 Requisition Activities
 Document Status

Amount Summary

Total Amount 589.92 USD

Select Lines To Display

Add Items From

Purchasing Kit Catalog
 Item Search Requirer Items

Search for Lines

Line To Retrieve

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1	7503532090	STONE NO. 21B, STONE	24.0000	LTN	7503532	24.58000	589.92	Open

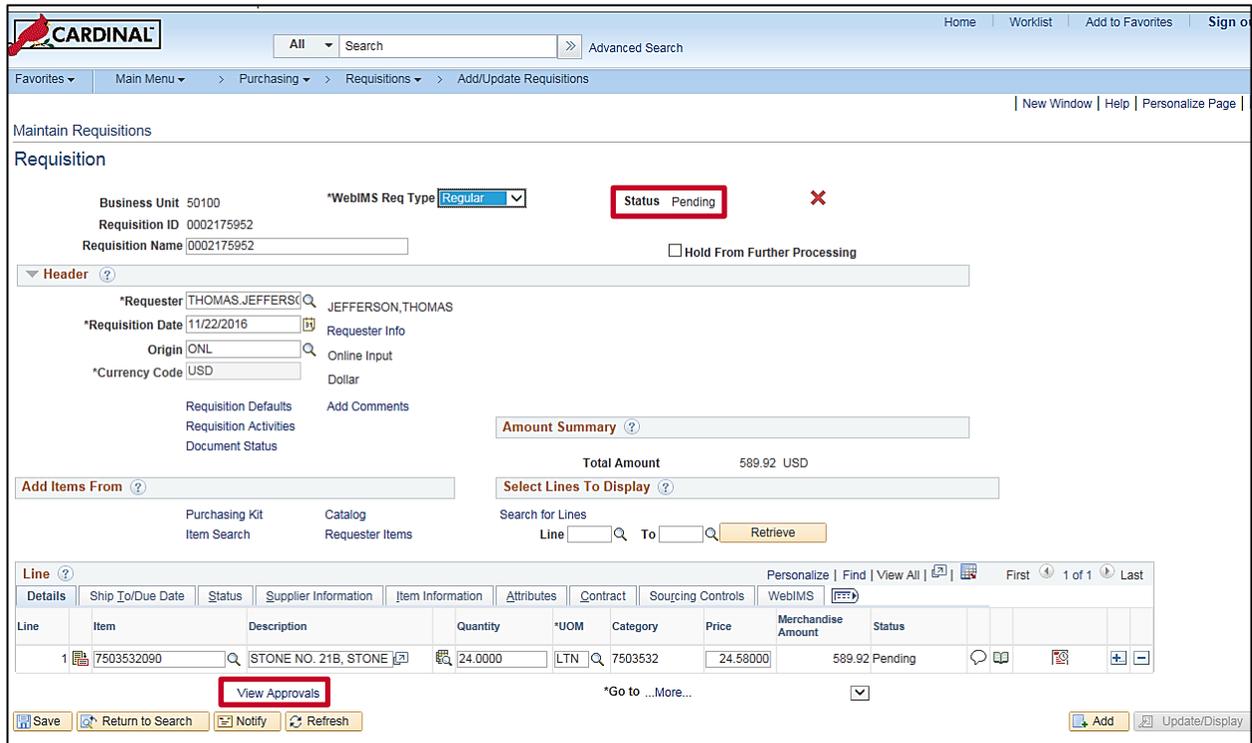
View Approvals *Go to ...More...

Save Return to Search Notify Refresh Add Update/Display

22. Click the **Save** button.

23. Cardinal assigns a **Requisition ID** number upon save.

24. Click the **Submit for Approval** check-box (the green checkmark), which is next to the **Status** field, to send it forward for approval by your supervisor. If prompted to save, click the **Yes** button.



Business Unit 50100 *WebIMS Req Type Regular **Status Pending**

Requisition ID 0002175952

Requisition Name 0002175952

*Requester THOMAS,JEFFERS JEFFERSON,THOMAS

*Requisition Date 11/22/2016

Origin ONL

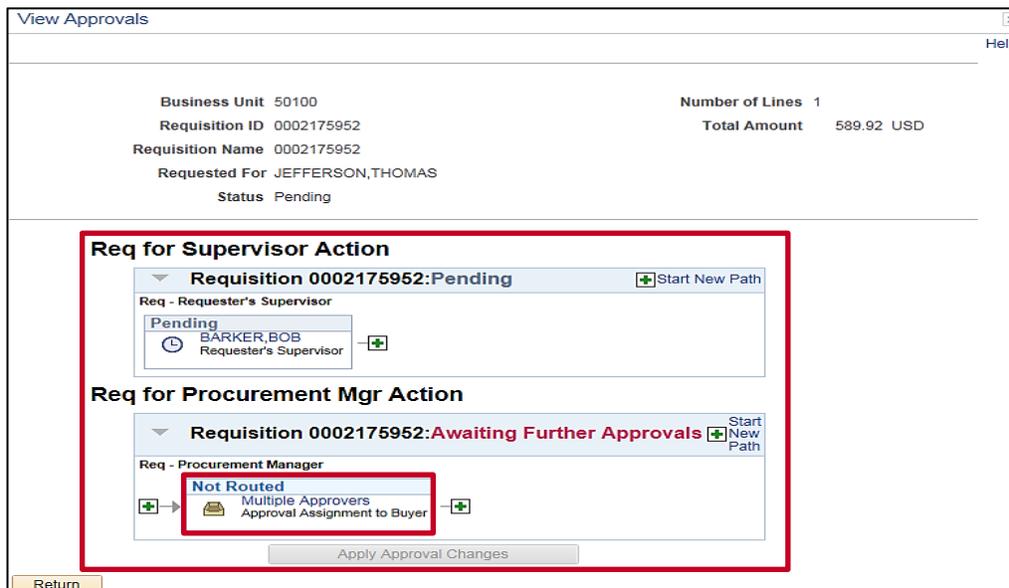
*Currency Code USD

Total Amount 589.92 USD

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1	7503532090	STONE NO. 21B, STONE	24.0000	LTN	7503532	24.58000	589.92	Pending

View Approvals

25. The requisition's **Status** changes to **Pending** and your supervisor is notified via email and worklist.
26. Click the **View Approvals** link to view the pending and completed approval actions. If prompted to save, click the **Yes** button.



Business Unit 50100 Number of Lines 1

Requisition ID 0002175952 Total Amount 589.92 USD

Requisition Name 0002175952

Requested For JEFFERSON,THOMAS

Status Pending

Req for Supervisor Action

Requisition 0002175952:Pending

Req - Requisition's Supervisor

Pending

BARKER,BOB

Requisition's Supervisor

Req for Procurement Mgr Action

Requisition 0002175952:Awaiting Further Approvals

Req - Procurement Manager

Not Routed

Multiple Approvers

Approval Assignment to Buyer

Apply Approval Changes

27. To view the list of approvers, click the **Multiple Approvers** link.



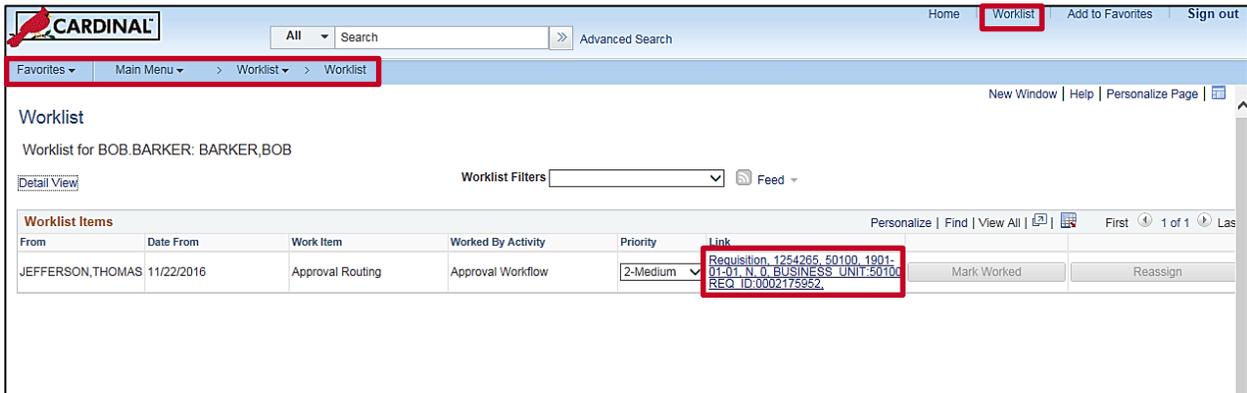
http://fn92trnweb.cov.virginia.gov/psc/fn92trn_ne...

Approver #1
 Name: EARHART,AMELIA
 Empl ID: EMP00000014
 Department: 10081
 Supervisor ID:
 Telephone:
 Reports To Position Number: TSP0003
 Email ID:

Approver #2
 Name: OAKLEY,ANNIE
 Empl ID: EMP00000026
 Department: 10081
 Supervisor ID:
 Telephone:
 Reports To Position Number: TSP0006
 Email ID:

Approver #3
 Name: BROWN,ANTRON
 Empl ID: EMP00000008
 Department: 10081
 Supervisor ID:
 Telephone:

28. Your supervisor will be notified of the pending approval via email and their worklist.



Home **Worklist** Add to Favorites Sign out

Search Advanced Search

Favorites Main Menu > Worklist > Worklist

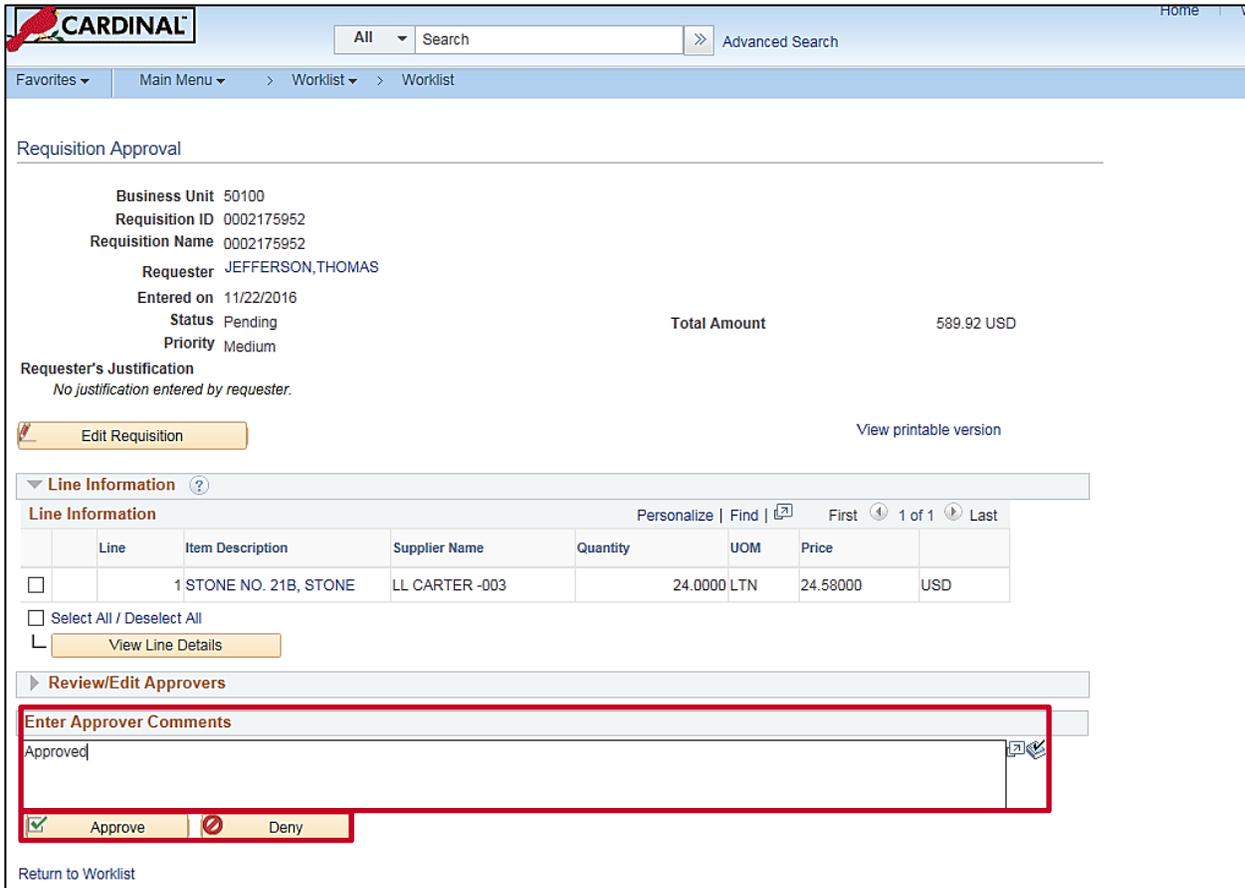
Worklist

Worklist for BOB.BARKER: BARKER,BOB

Detail View Worklist Filters Feed

From	Date From	Work Item	Worked By Activity	Priority	Link		
JEFFERSON,THOMAS	11/22/2016	Approval Routing	Approval Workflow	2-Medium	Requisition 1254265, 50100, 1901-01-01, N.O. BUSINESS UNIT:50100 REQ ID:0002173952.	Mark Worked	Reassign

29. From the **Worklist**, your supervisor can open the item by clicking the requisition's link.



Requisition Approval

Business Unit 50100
 Requisition ID 0002175952
 Requisition Name 0002175952
 Requester JEFFERSON, THOMAS
 Entered on 11/22/2016
 Status Pending
 Priority Medium
 Total Amount 589.92 USD

Requester's Justification
 No justification entered by requester.

[Edit Requisition](#) [View printable version](#)

Line Information

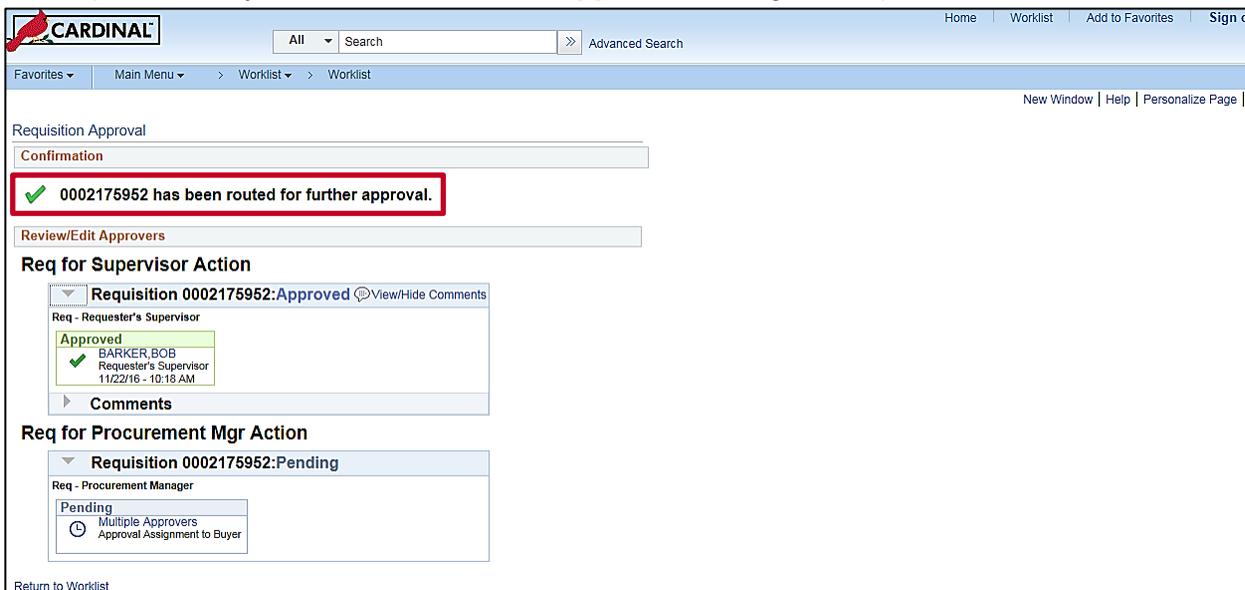
Line	Item Description	Supplier Name	Quantity	UOM	Price
1	STONE NO. 21B, STONE	LL CARTER -003	24.0000	LTN	24.58000 USD

[Review/Edit Approvers](#)

Enter Approver Comments
 Approved

[Approve](#) [Deny](#)

30. The supervisor may insert a comment and **Approve** or **Deny** the requisition.



Confirmation

✓ 0002175952 has been routed for further approval.

Req for Supervisor Action

Requisition 0002175952: Approved

Approved
 BARKER, BOB
 Requester's Supervisor
 11/22/16 - 10:18 AM

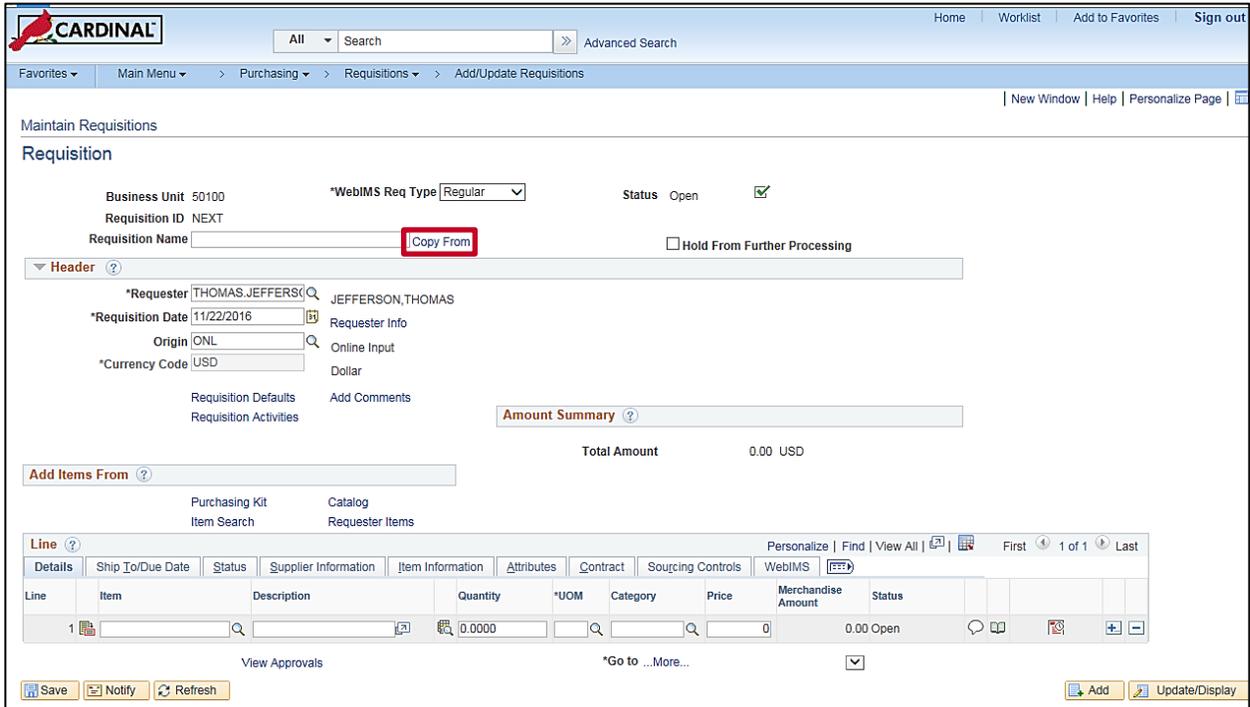
Req for Procurement Mgr Action

Requisition 0002175952: Pending

Pending
 Multiple Approvers
 Approval Assignment to Buyer

31. Once approved, the requisition is forwarded to the Procurement Office for assignment to a buyer.

Create a Requisition from a Requisition



The screenshot shows the 'Maintain Requisitions' page in the Cardinal system. The page title is 'Requisition'. The business unit is '50100', the WebIMS Req Type is 'Regular', and the status is 'Open'. The Requisition ID is 'NEXT'. The Requisition Name field is empty, and the 'Copy From' link is highlighted in a red box. The 'Header' section shows the requester as 'THOMAS,JEFFERS' and the requester info as 'JEFFERSON,THOMAS'. The requisition date is '11/22/2016', the origin is 'ONL', and the currency code is 'USD'. The 'Amount Summary' section shows a total amount of '0.00 USD'. The 'Add Items From' section has tabs for 'Purchasing Kit', 'Catalog', 'Item Search', and 'Requester Items'. The 'Line' section shows a table with one line item. The table has columns for Line, Item, Description, Quantity, UOM, Category, Price, Merchandise Amount, and Status. The first line item has a quantity of '0.0000' and a price of '0'. The status is '0.00 Open'. The page also includes a 'View Approvals' link and a '*Go to ...More...' dropdown menu. At the bottom, there are buttons for 'Save', 'Notify', 'Refresh', 'Add', and 'Update/Display'.

1. Repeat [steps 1-3 \(page 2\)](#).
2. Click the **Copy From** link.

Req Inquiry Selection Help

Maintain Requisitions

Copy Requisition

Header

Business Unit 50100

Requisition ID 0002175952

Requisition Name

Req Status

Requester

Requester Name

Requisition Date

To

Supplier SetID STATE Supplier Lookup

Supplier ID Supplier Details

Supplier Name

Item SetID STATE

Item ID

Item Description Direct Ship

254 characters remaining

Department

Requisition Personalize | Find | View All | | First 1 of 1 Last

Sel	Req ID	Requisition Name	Status	Origin	Requester
<input type="checkbox"/>					

3. Enter the **Requisition ID** for the requisition you wish to copy.
4. Click the **Search** button.

Req Inquiry Selection Help

Maintain Requisitions

Copy Requisition

Header

Business Unit

Requisition ID

Requisition Name

Req Status Origin

Requester

Requester Name

Requisition Date To

Supplier SetID

Supplier ID Supplier Name

Item SetID Item ID

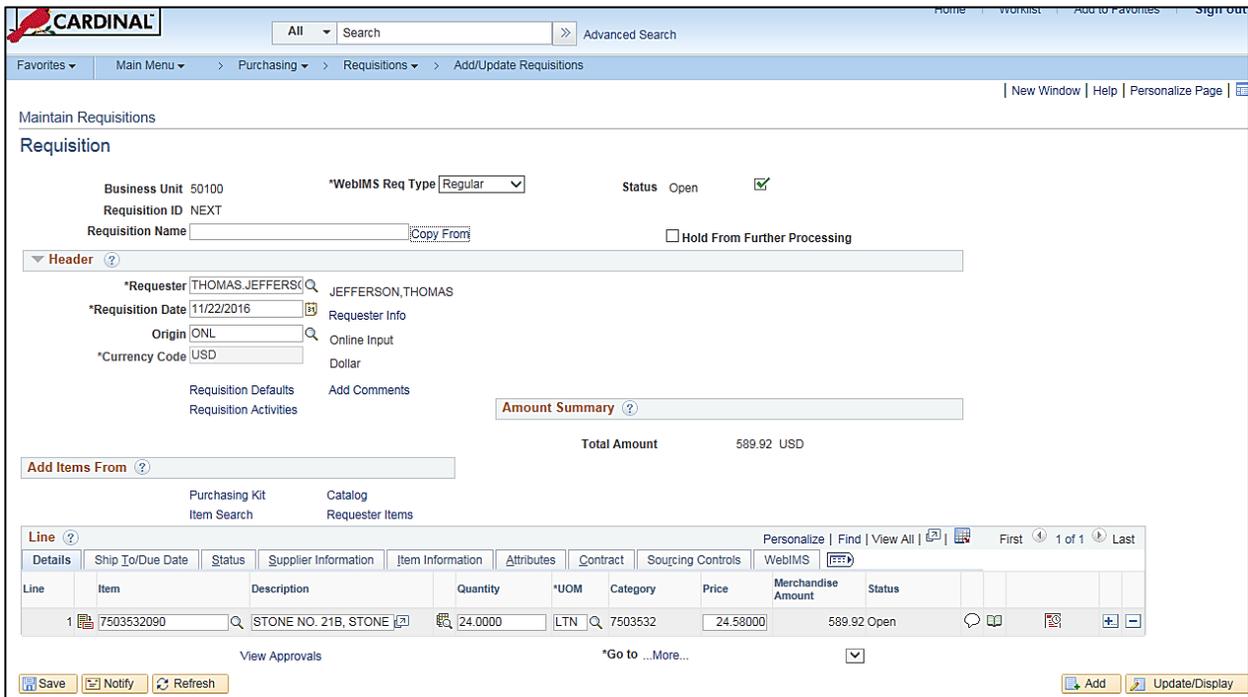
Item Description Direct Ship

254 characters remaining

Department

Requisition						Personalize	Find	View All	Print	First	1 of 1	Last
Sel	Req ID	Requisition Name	Status	Origin	Requester							
<input checked="" type="checkbox"/>	0002175952	0002175952	Pending Approval	ONL	THOMAS.JEFFERSON							

- From the search results, located below the **Search** button, select the requisition by clicking the **Sel** check-box.
- Click the **OK** button to select that requisition to copy.



Cardinal | All | Search | Advanced Search

Home | Worklist | Add to Favorites | Sign out

Favorites | Main Menu | Purchasing | Requisitions | Add/Update Requisitions | New Window | Help | Personalize Page

Maintain Requisitions

Requisition

Business Unit: 50100 | *WebIMS Req Type: Regular | Status: Open

Requisition ID: NEXT

Requisition Name: Copy From Hold From Further Processing

Header

*Requester: THOMAS.JEFFERS | JEFFERSON, THOMAS

*Requisition Date: 11/22/2016 | Requisition Info

Origin: ONL | Online Input

*Currency Code: USD | Dollar

Requisition Defaults | Add Comments

Requisition Activities

Amount Summary

Total Amount: 589.92 USD

Add Items From

Purchasing Kit | Catalog

Item Search | Requirer Items

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1	7503532090	STONE NO. 21B, STONE	24.0000	LTN	7503532	24.58000	589.92	Open

View Approvals | *Go to ...More...

Save | Notify | Refresh | Add | Update/Display

- The Requisition displays with all copied values, including accounting distribution.
- Repeat steps 13-24 from above, as applicable. Be careful to review and update all fields, such as quantity and accounting distribution, as needed. The requisition is complete and pending approval.

Requisition Helpful Hints – Item Information



Add Items From

Purchasing Kit | Catalog

Item Search | Requirer Items

Line

Details | Ship To/Due Date | Status | Supplier Information | **Item Information** | Attributes | Contract | Sourcing Controls | WebIMS

Line	Item	Description	GTIN	RFQ Required	Device Tracking	Supplier Item ID	Supplier's Catalog	Manufacturer ID	Manufacturer's Item ID
1	0051404115	ABRASIVES.		<input type="checkbox"/>	<input type="checkbox"/>				920253

View Approvals | *Go to ...More...

Save | Notify | Refresh | Add | Update/Display

- The **Item Information** tab allows you to enter specific supplier item information (e.g., Grainger Catalog, Version 13, pg. 6. Item # XXXXXX).
- For VDC (Virginia Distribution Center) related items, use the **Manufacturer's Item ID** field to insert VDC stock item number.
- To specify a District/CO and District/Division location, use the **Manufacturer ID** and **Manufacturer's Item ID**.